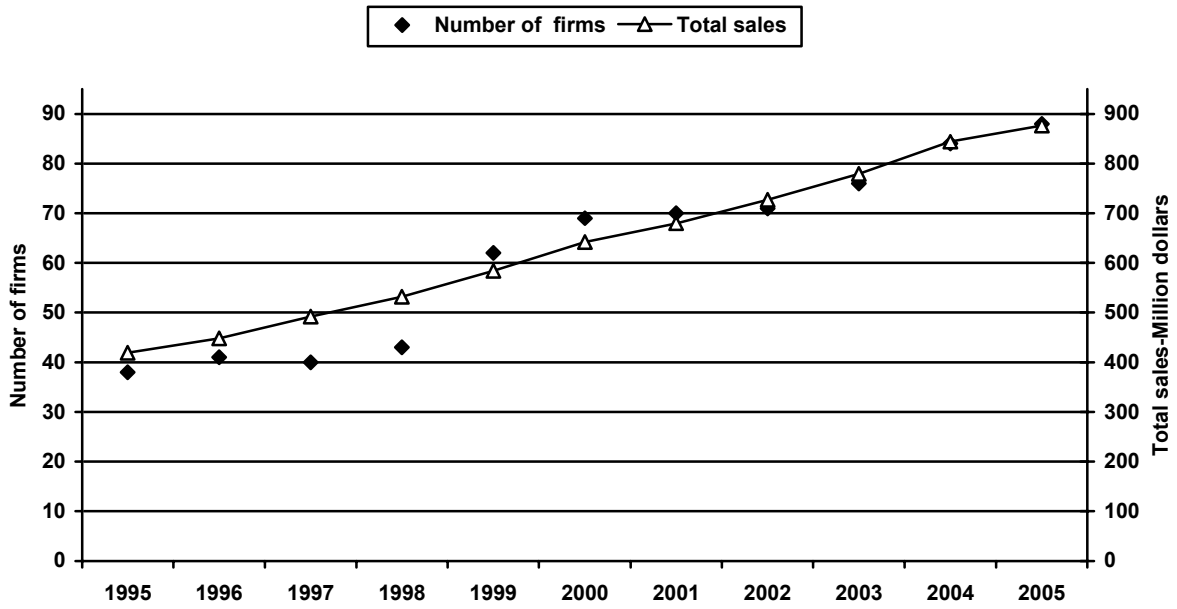


Oregon Nursery and Greenhouse Survey 2005

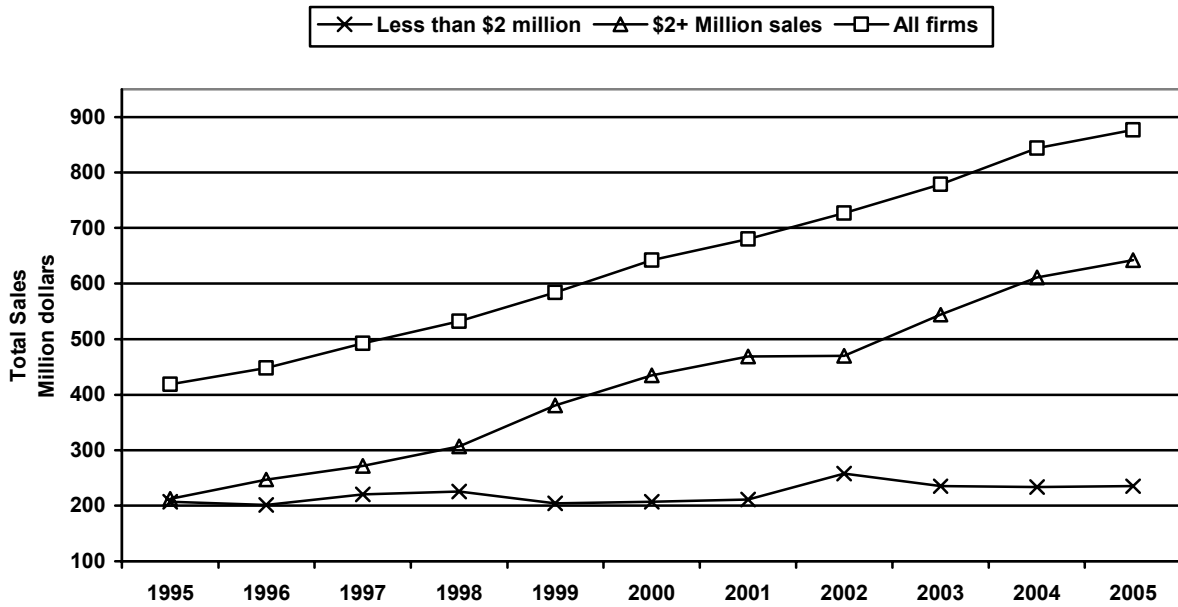


USDA - NASS Oregon Field Office

Number of firms with \$2+ million in sales,
and total sales, Oregon, 1995-2005



Gross sales of firms with above and below \$2 million in sales,
and total sales, Oregon, 1995-2005



2005

OREGON NURSERY

and

GREENHOUSE

SURVEY

Compiled and Published by

Oregon Field Office

National Agricultural Statistics Service

United States Department of Agriculture

Christopher A. Mertz, Director
Bruce Eklund, Deputy Director

Kent Hoddick, Agricultural Statistician
Chuck Bennett, Statistical Assistant
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Mali Viste, Office Automation Assistant

FORWARD

September 2006

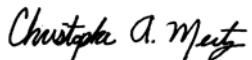
The release of the *2005 Oregon Nursery and Greenhouse Survey* results represents the sixteenth year of documenting through statistics the progress of Oregon's # 1 agricultural industry. Nursery and greenhouse sales climbed to \$877 million in 2005, up 4 percent from the previous year, demonstrating that the industry continues to do an outstanding job of growing and marketing high quality nursery stock and materials. This growth continues despite the challenges of truck shortages, rising fuel, transportation, and labor costs, sometimes burdensome regulations, and competition for land. The industry is a key generator of revenue for the State, within excess of 75 percent or \$663 million of sales coming from outside Oregon.

Oregon's top five producing counties Clackamas, Washington, Marion, Yamhill, and Multnomah are in or near the Portland metropolitan area. The nurseries and greenhouses in these five counties represent 86 percent of the total value of production, providing local employment and beautifying the urbanized landscape.

Container sales continue to dominate the product categories, accounting for 44 percent of the sales for all product types; this share is up 3 percent from 2004.

We would like to thank the many Oregon nurseries and greenhouses, the Oregon Association of Nurseries, the Oregon Department of Agriculture, our crew of field interviewers, and others who provide information and support for this important annual effort. Access to accurate and timely information is critical to the continued success of this vital sector of Oregon agriculture.

Sincerely,



Christopher A. Mertz
Director

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2005 Oregon nursery product sales set another record.

Oregon's horticulture industries continued to grow in 2005 with another record high sales value of \$877 million for nursery and greenhouse products. This was the sixteenth year of this survey and the fifteenth year of record sales. Sales in 2005 climbed 4 percent above 2004 and were over 2 times the sales of 1995. The horticulture industry continued to solidify its place above all other Oregon agricultural commodities, claiming nearly 21 percent of the total value of agricultural production. Cattle, with a value of \$533 million. Ranked second, while grass seeds and all milk claimed third and fourth places with sales of \$373.5 million and \$358.6 million, respectively.

(continued on page 3)

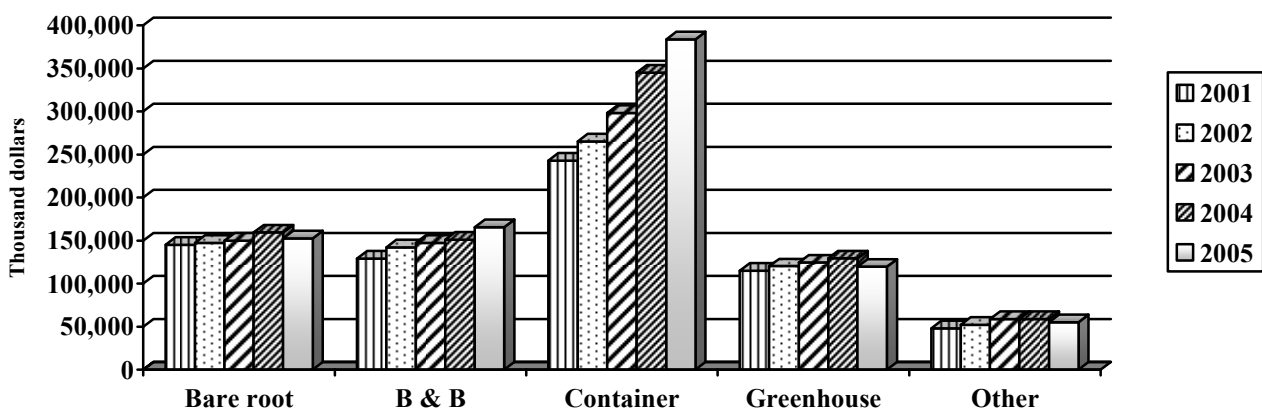
Nursery and greenhouse: Gross sales, by plant material, Oregon, 1999-2005

Plant material	1999	2000	2001	2002	2003	2004	2005	2005/2004
	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>Percent</i>
Bare root	116,300	136,700	145,100	147,500	150,100	159,400	152,700	96
B & B	97,500	127,700	129,100	142,100	147,400	151,000	165,600	110
Container	223,100	226,300	243,100	265,100	298,300	345,300	384,000	111
Greenhouse	103,100	106,600	114,700	120,100	124,300	129,400	119,700	93
Other	44,000	44,700	48,000	52,200	58,900	58,900	55,000	93
Total	584,000	642,000	680,000	727,000	779,000	844,000	877,000	104

Nursery and greenhouse: Gross sales by sales size group, Oregon, 2001-2005

Sales size group	Gross sales					2005/2004
	2001	2002	2003	2004	2005	
	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>Percent</i>
Less than \$20,000	6,300	6,100	6,400	7,700	5,900	77
\$20,000-\$99,999	16,100	18,000	18,100	18,900	21,600	114
\$100,000-\$199,999	14,000	15,300	15,900	16,700	13,200	79
\$200,000-\$499,999	44,400	41,600	45,200	45,100	43,500	96
\$500,000-\$1,999,999	130,500	149,500	149,400	144,300	150,900	105
More than \$2,000,000	468,700	469,500	544,000	611,300	641,900	105
Total	680,000	727,000	779,000	844,000	877,000	104

Nursery and greenhouse: Gross sales by plant material, Oregon, 2001-2005



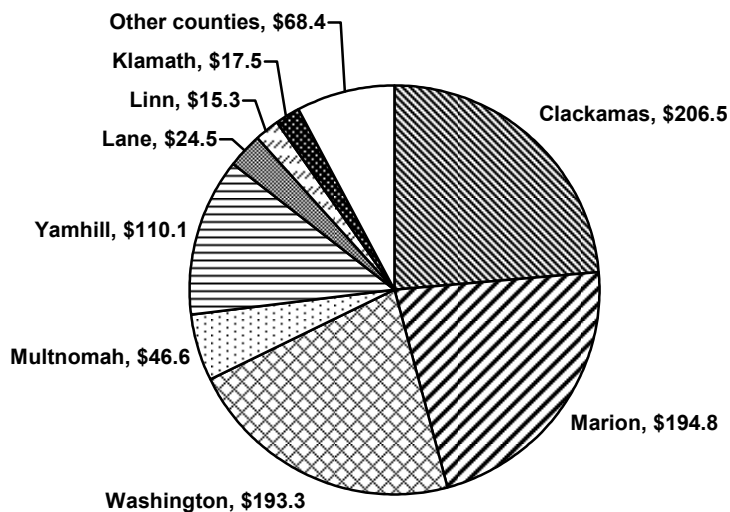
Nursery and greenhouse: Operations, acreage, and gross sales, by county, Oregon, 2003-2005

County	Number of operations	Acreage	Gross sales			
	2005	2005	2003	2004	2005	2005 / 2004
	<i>Operations</i>	<i>Acres</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>Percent</i>
Benton	46	330	1,500	1,800	1,800	100
Clackamas	477	13,500	175,500	193,500	206,500	107
Curry	20	380	4,750	4,250	3,700	87
Deschutes	45	310	3,550	3,600	3,800	106
Douglas	53	580	3,850	3,750	3,900	104
Jackson	75	130	3,100	3,150	3,300	105
Josephine	47	130	2,400	2,500	2,800	112
Klamath	15	1,760	11,350	14,100	17,500	124
Lane	145	680	20,950	24,000	24,500	102
Lincoln	26	130	2,850	2,700	2,400	89
Linn	81	780	11,650	14,800	15,300	103
Marion	361	13,160	174,150	178,900	194,800	109
Multnomah	184	3,550	45,100	49,000	46,600	95
Polk	51	1,250	10,950	10,300	9,700	94
Umatilla	16	720	5,300	6,800	8,000	118
Washington	259	7,410	163,750	191,200	193,300	101
Yamhill	103	6,100	106,800	115,900	110,100	95
Other counties ¹	147	900	31,500	23,750	29,000	122
Oregon	2,151	51,800	779,000	844,000	877,000	104
Top five counties ²	1,384	43,720	665,300	728,500	751,300	103

¹ Contains counties with less than one million dollars of sales and counties that were combined to avoid disclosure of individual operations.

² Top five counties include: Clackamas, Marion, Multnomah, Washington, and Yamhill.

Nursery and greenhouse: Gross sales by county, Oregon, 2005 Oregon-\$877 million



(continued from page 1)

Overall the value of nursery sales increased \$33 million, container sales, increased \$38.7 million over last year, while bare root products gained \$14.6 million. Three categories decreased from 2004, greenhouse products decreased \$9.7 million, bare root products decreased \$6.7 million, and other products decreased \$3.9 million.

Gross sales, when broken down by sales size groups, showed increases in three size groups and decreases in three size groups. The largest size group, 2+ million, increased 5 percent or \$30.6 million over 2004 and the second largest size group \$500,000 to \$2 million also increased 5 percent, but only \$6.6 million.

Firms with sales over \$2 million made up 73.2 percent of all Oregon sales, and the total number of firms in this group increased 4 firms to a total of 88 firms.

Oregon top four counties of production, Clackamas, Marion, Washington, and Yamhill had sales of \$206.5 million, \$194.8 million, \$193.3 million, and \$110.1 million, respectively. In total, these four counties accounted for 80 percent of all the sales. When Multnomah County's sales of \$46.6 million are included, the total value of production in the top five counties account for 86 percent of total production. Clackamas County is still the major production area, but Washington County which has been the second largest county of production was replaced by Marion County this year. Marion County sales were only \$1.5 million above Washington County and increased \$15.9 million above last year. Given the number of growers and acres in production in Clackamas, Washington, and Marion counties, any of these three could be the number one producer next year.

Nursery and greenhouse: Acreage by plant material, Oregon, 1997, 1999, 2001, 2003, and 2005 ¹

Plant material	1997	1999	2001	2003	2005	2005/2003
	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Percent</i>
Bare root	10,100	10,800	11,800	12,000	13,200	110
B & B	12,100	14,660	15,500	17,500	18,700	107
Container	5,100	5,500	5,600	6,900	8,600	125
Greenhouse	630	640	700	800	800	100
Other plant materials ²	5,300	5,500	6,700	6,200	5,500	89
Other acreage ³	4,900	4,000	4,900	7,000	5,000	71
Total	38,130	41,100	45,200	50,400	51,800	103

¹ Acreage by plant material is collected once every two years.

² Other nursery plant materials include sod, bulbs, tubers, holly, cut greens, and other materials.

³ Includes other acres in the nursery operation such as buildings, loading docks, and parking.

Nursery and greenhouse: Summary, by sales size group, Oregon, 2005

Sales size group	Number of operations	Acres	Gross sales	Total workers	Total wages
	<i>Operations</i>	<i>Acres</i>	<i>1,000 dollars</i>	<i>Workers</i>	<i>1,000 dollars</i>
Less than \$20,000	1,194	2,200	5,900	1,170	1,100
\$20,000-\$99,999	483	2,700	21,600	1,400	5,020
\$100,000-\$199,999	94	1,200	13,200	630	4,065
\$200,000-\$499,999	140	3,700	43,500	1,500	13,480
\$500,000-\$1,999,999	152	11,300	150,900	4,600	53,640
More than \$2,000,000	88	30,700	641,900	12,700	216,600
Total	2,151	51,800	877,000	22,000	293,905

Wages and number of workers up

The number of workers employed increased 2 percent from 2003 to a total of 22,000. The average total wages paid to workers rose by 5 percent to \$13,359 dollars. Firms with sales over 2 million dollars employ 58 percent of the workers, pay 74 percent of the wages, and pay an average wage of \$17,055 dollars per worker. Full time worker numbers continued upward, reaching 10,400 for 2005. Seasonal worker numbers, remained unchanged from 2003 at 11,600 workers for 2005. Wages were the biggest expense the nursery and greenhouse industry had, accounting for 33.5 percent of total sales.

Nursery and greenhouse: Workers, and gross wages paid, Oregon, 2005

Sales size group	Workers			Total wages	Average wages per worker
	Full time	Seasonal	Total		
	<i>Number</i>	<i>Number</i>	<i>Number</i>	<i>1,000 dollars</i>	<i>Dollars</i>
Less than \$20,000	70	1,100	1,170	1,100	940
\$20,000-\$99,999	200	1,200	1,400	5,020	3,586
\$100,000-\$199,999	130	500	630	4,065	6,452
\$200,000-\$499,999	600	900	1,500	13,480	8,987
\$500,000-\$1,999,999	2,000	2,600	4,600	53,640	11,661
More than \$2,000,000	7,400	5,300	12,700	216,600	17,055
Total	10,400	11,600	22,000	293,905	13,359

Nursery and greenhouse: Workers, wages, and number of operations, Oregon, 1999, 2001, 2003, and 2005 ¹

Category	1999	2001	2003	2005	2005/2003
Seasonal workers..... Workers	12,200	10,850	11,600	11,600	100
Full time workers Workers	9,000	9,550	10,000	10,400	104
Total workers Workers	21,200	20,400	21,600	22,000	102
Total wages 1,000 dollars	201,170	232,557	275,200	293,905	107
Average wage per worker..... Dollars	9,489	11,400	12,741	13,359	105
Number of operations..... Operations	2,185	2,139	2,044	2,151	105

¹ Worker and wage data are collected once every two years.

Nursery and greenhouse: Destination of gross sales by plant material, Oregon, 1995, 1999, and 2003 ¹

Destination	Plant material type								
	Bare root			B & B			Container		
	1995	1999	2003	1995	1999	2003	1995	1999	2003
	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>
Oregon	19,420	20,610	19,000	15,690	18,560	24,780	30,240	42,280	53,380
Washington	8,185	8,480	9,000	8,850	9,850	11,920	15,090	25,860	31,930
California	4,625	6,390	8,830	2,346	4,060	5,950	8,150	16,900	17,770
Other western States ²	3,225	4,670	8,000	8,085	8,560	15,330	13,080	25,510	31,030
Upper Midwest ³	20,130	21,560	37,660	9,490	15,160	23,570	31,620	36,060	62,480
Gulf States ⁴	4,800	4,690	5,910	1,315	2,680	3,470	3,660	6,450	10,340
Atlantic States ⁵	9,375	24,400	27,100	5,937	12,860	21,150	11,300	30,950	32,840
Northeast States ⁶	9,345	21,050	24,650	13,450	21,900	36,060	24,110	33,160	49,970
Western Canada ⁷	2,070	2,770	2,300	1,654	1,750	1,950	6,260	3,210	3,810
Eastern Canada ⁸	845	1,220	6,950	760	2,120	3,220	4,260	2,440	4,590
Other foreign countries	880	460	700	223	-	-	330	280	160
Total	82,900	116,300	150,100	67,800	97,500	147,400	148,100	223,100	298,300

Nursery and greenhouse: Destination of gross sales by plant material, Oregon, 1995, 1999, and 2003 ¹ (continued)

Destination	Plant material type									2003/ 1999	Percent of total sales by destination
	Greenhouse			Other			Total				
	1995	1999	2003	1995	1999	2003	1995	1999	2003		
	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>Percent</i>	<i>Percent</i>
Oregon	47,415	60,680	73,480	13,670	17,450	19,130	126,435	159,580	189,770	119	24.3
Washington	11,275	14,920	18,260	4,010	2,320	4,490	47,410	61,430	75,600	123	9.7
California	10,160	9,700	9,340	5,630	9,670	12,080	30,911	46,720	53,970	116	6.9
Other western States ²	1,710	2,150	4,130	1,140	1,030	2,640	27,240	41,920	61,130	146	7.8
Upper Midwest ³	4,325	3,680	4,610	3,350	2,810	3,870	68,915	79,270	132,190	167	17.0
Gulf States ⁴	1,600	2,030	1,670	1,900	1,890	3,220	13,275	17,740	24,610	139	3.2
Atlantic States ⁵	1,475	3,260	2,310	4,020	2,750	3,380	32,107	74,220	86,780	117	11.1
Northeast States ⁶	2,150	3,350	4,940	2,320	2,290	5,520	51,375	81,750	121,140	148	15.6
Western Canada ⁷	2,015	2,060	2,450	450	360	910	12,449	10,150	11,420	113	1.5
Eastern Canada ⁸	1,025	1,090	2,410	180	690	1,460	7,070	7,560	18,630	246	2.4
Other foreign countries	350	180	700	30	2,740	2,200	1,813	3,660	3,760	103	0.5
Total	83,500	103,100	124,300	36,700	44,000	58,900	419,000	584,000	779,000	133	100.0

¹ Gross sales by destination is collected once every four years. The 2006 publication, which is scheduled for release in September 2007, will be the next release containing these data.

² Other western States include: MT, ID, WY, NV, UT, AZ, NM, CO, AK, HI.

³ Upper Midwest includes: ND, SD, NE, KS, MN, IA, MO, WI, IL, MI, IN, OH, KY.

⁴ Gulf States include: OK, TX, AR, LA, TN, MS, AL.

⁵ Atlantic States include: MD, DE, WV, VA, NC, SC, GA, FL.

⁶ Northeast States include: ME, NH, VT, MA, CT, RI, NY, PA, NJ.

⁷ Western Canada includes: BC, AB, SK, MB.

⁸ Eastern Canada includes all other provinces.

Data collection

The 2005 Oregon Nursery and Greenhouse Survey was designed to collect data on all commercial nurseries, greenhouses, and producers of other plant material, such as roses, holly, bulbs, sod, cut flowers, dried flowers, etc. in the State. A stratified random sample of 706 names was selected from the State of Oregon's list of licensed nurseries and greenhouses for 2005. They were classified into six broad size groups based on sales volume. The Oregon Agricultural Statistics Service's floriculture survey was used to supplement the list for those firms who are not required to have a State license.

Questionnaires were mailed to the sampled names on June 12, 2006, followed by a second request on July 13. All non-respondents were phoned or visited from August 11 – 30. Cooperation was excellent with 92 percent of the sampled names participating in the survey. Data for minor counties and items were combined with other totals to avoid disclosure of individual operations.

The sample design was developed by the National Agricultural Statistics Service. Kent Hoddick of the Oregon Staff has been the survey coordinator of the Oregon Nursery and Greenhouse program since its inception in 1991.

Nursery and greenhouse: Number of operations, by sales size group, Oregon, 1999-2005

Sales size group	Number of operations						
	1999	2000	2001	2002	2003	2004	2005
Less than \$20,000	1,396	1,324	1,337	1,375	1,182	1,194	1,194
\$20,000-\$99,999	356	343	362	353	389	396	483
\$100,000-\$199,999	121	103	98	106	112	115	94
\$200,000-\$499,999	116	126	138	136	136	140	140
\$500,000-\$1,999,999	135	137	134	142	149	144	152
More than \$2,000,000	62	69	70	71	76	84	88
Total	2,185	2,102	2,139	2,183	2,044	2,073	2,151

Nursery and greenhouse: Gross sales and operations, historic trends, Oregon, 1990-2005

Year	Gross sales	Change from previous year	Operations	
			Total operations	Operations with over \$2 million in sales
	<i>1,000 dollars</i>	<i>Percent</i>	<i>Operations</i>	<i>Operations</i>
1990	315,000	(¹)	(¹)	(¹)
1991	341,000	108	1,704	(¹)
1992	345,000	101	1,900	(¹)
1993	347,000	101	1,986	(¹)
1994	385,000	111	1,979	32
1995	419,000	109	1,905	38
1996	448,000	107	1,983	41
1997	492,000	110	2,040	40
1998	532,000	108	2,082	43
1999	584,000	110	2,185	62
2000	642,000	110	2,102	69
2001	680,000	106	2,139	70
2002	727,000	107	2,183	71
2003	779,000	107	2,044	76
2004	844,000	108	2,073	84
2005	877,000	104	2,151	88

¹ No data available.



OREGON NURSERY AND GREENHOUSE SURVEY 2005



**NATIONAL
AGRICULTURAL
STATISTICS
SERVICE**

Oregon Field Office
1220 S.W. 3rd Ave. Room 1735
Portland, OR 97204
Phone 503-326-2131, Fax 503-326-2549
nass-or@nass.usda.gov

SAMPLE QUESTIONNAIRE

Dear Nursery/Greenhouse Grower:

The nursery and greenhouse industry continues to gain prominence in Oregon as the State's leading agricultural industry and nationally as a leading State in production and value. Please take a few minutes to complete the annual Nursery and Greenhouse Survey which is the only means of measuring annual growth and change of Oregon's major agricultural industry. The survey is voluntary. Your individual data will be kept confidential and only used in summaries with other reports. The nursery/greenhouse report will be released in August 2006 and is used extensively by your industry, universities, the legislature and local governments for informed decision making concerning issues affecting both the industry and Oregonians in general.

Sincerely,

Christopher A. Mertz
Director

Please make corrections to name, address, and Zip Code if necessary.

SECTION 1 - Introduction

1. Did you produce, sell, or have growing any nursery or greenhouse crops (including container grown), bulbs, sod, bedding plants, cut flowers, holly and dried flowers, etc. during 2005?

☐ **YES** – Please go to Section 2. ☐ **NO** – Please go to page 3, Section 6.



SECTION 2 – Gross Sales Value

2. What were your gross (invoice) sales from your nursery and greenhouse operation for each of the following plant material categories, and in total during 2005? If calendar year data are not available, please use the most recent fiscal year period. (exclude plant material purchased for immediate resale.)

- a. Bare Root
- b. Balled and Burlapped
- c. Container
- d. Greenhouse
- e. Other Nursery Plant Materials (include sod, bulbs, tubers, holly, cut greens, etc.).....
- f. **TOTAL** (should equal a+b+c+d+e)

2005 Gross Sales (in Dollars)	
311	
312	
313	
314	
315	
310	

Continue →

SECTION 3 – Nursery Acres Operated

3. What was the acreage under production, by plant material type, other nursery acreage, and total for your operation during 2005? (Please report acres to the nearest one-tenth.)
(include acreage even if no sales were made.)

			Acres
a. Bare Root		101	.
b. Balled and Burlapped		102	.
c. Container		103	.
	Square Feet		
d. Greenhouse (enter square footage and acreage)	104	105	.
e. Other Nursery Plant Materials (include sod, bulbs, tubers, holly, cut greens, etc.)		106	.
f. Other Nursery Acreage in Operation (buildings, loading docks, parking, etc.)		107	.
g. Total (should equal items a+b+c+d+e+f)		110	.

SAMPLE QUESTIONNAIRE

SECTION 4 – Acres Operated by County

4. List the Oregon county or counties where your nursery or greenhouse acreage is located. If your acreage is in more than one county, list each county separately, with the percent of gross sales by county. **(exclude acreage located in other States.)**

County	Acres	Percent of Gross Sales	Office Use
..... +	611	621	601
..... +	612	622	602
..... +	613	623	603
..... +	614	624	604
TOTAL (Should equal total in item 3g above) ... =	615	100%	

SECTION 5 – Hired and Contract Workers

5. What was the total number of workers paid by this operation during 2005?
(include contract workers)
- a. Of these total workers, how many were seasonal/part-time
(worked less than 150 days) during 2005?
- b. Of these total workers, how many were full-time
(worked more than 150 days) during 2005?

Number
500
501
502
Dollars
510

6. What were the total gross wages paid for your nursery/greenhouse operation during 2005? (include employer's cost for social security, workers compensation, insurance premiums, pension plans, and any other benefits provided.)

*** SKIP TO SECTION 7 ***

SECTION 6 – Change in Operator

7. Has this operation been sold, rented out, or turned over to someone else?

☐ **YES** – Please identify the new operator.

☐ **NO** – Please check one reason which applies.

Name: _____

☐ Retail sales only

Address: _____

☐ New operation with no 2005 sales.

City, State: _____ Zip: _____

(Please complete Sections 3 & 4)

☐ Other (Explain) _____

SECTION 7 – Survey Results

8. Would you like to receive a copy of the results of this survey? ☐ Yes ☐ No

If additional help is needed, please call: 1-800-338-2157

In Portland area, please call: 503-326-2131

Comments

SAMPLE QUESTIONNAIRE

Office Use
099
910
920

Reported by: _____ Phone: _____ Date: _____

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The time required to complete this information collection is estimated to average 15 minutes per response.

Additional references to recent Oregon horticulture data

2005 Floriculture Crops 2005 Summary: United States and State data. 124 pages.
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